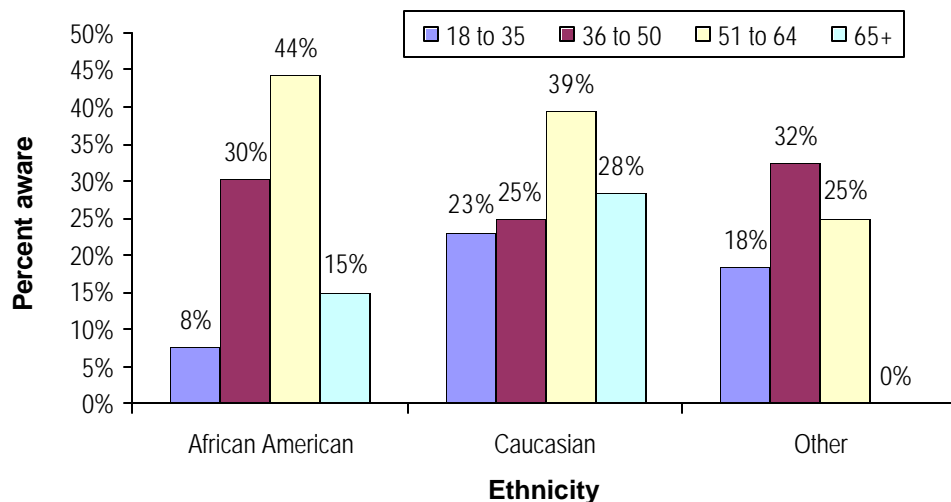


City Cable Office

Overall, 26% of the cable subscribers and 25% of the non subscribers said that they are aware that the City of Seattle has a Cable Office with a Customer Bill of Rights to protect the rights of cable consumers, and 20% wanted the City to contact them about their rights as cable customers. Millennium subscribers were most likely to say they wanted to be contacted (31%) compared

with Comcast customers (21%) and those without current cable service (14%).

37. Awareness of the City's Cable Office lowest among youngest and oldest; especially among non Caucasians

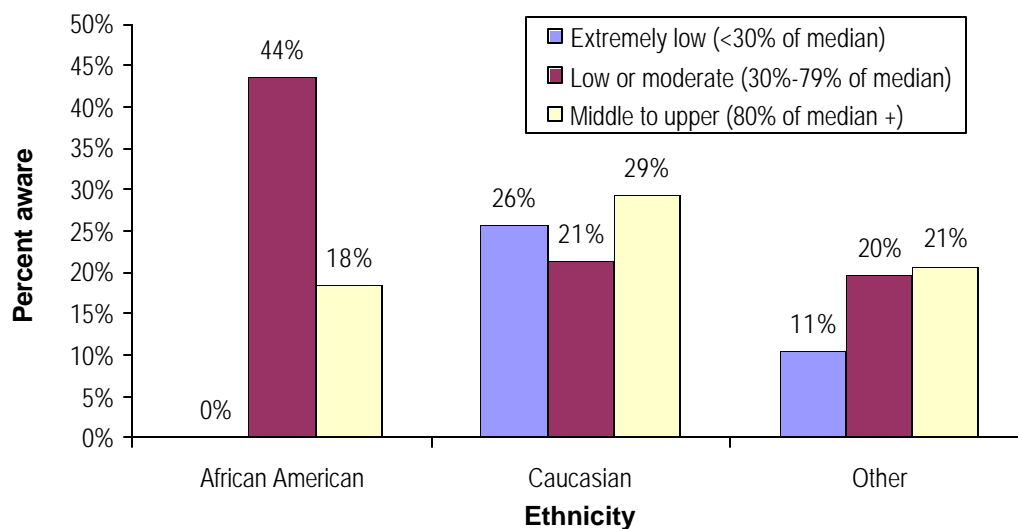


Source: 2004 Seattle IT Residential Survey

Figure 37 shows that overall, the youngest and the oldest respondents are least likely to say they are aware of the City's Cable Office and those between 51 and 64 are the most likely to be aware. Among the Caucasian respondents, the impact of age on

awareness is not as great. Similarly, Figure 38 shows that income influences the likelihood that the non Caucasian respondents are aware of the City's Cable Office, but the Caucasian

38. Awareness of the City's Cable Office is influenced by income level except among Caucasian respondents

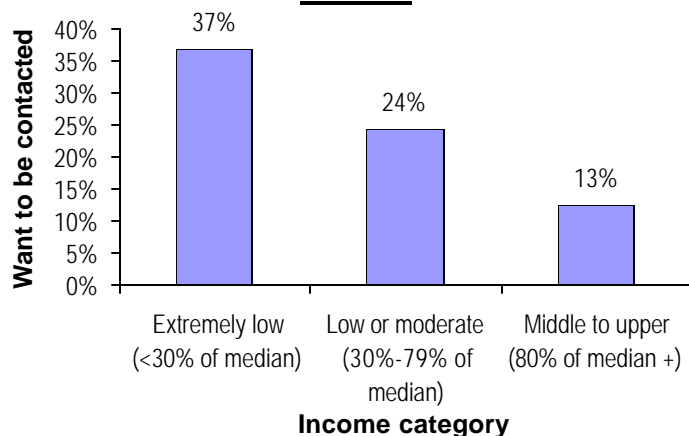


Source: 2004 Seattle IT Residential Survey

respondents seem to be protected from this income effect.

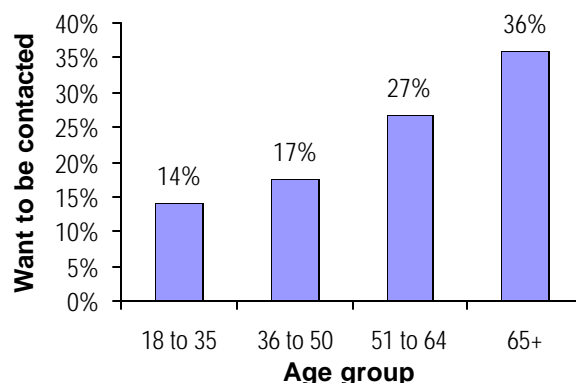
Responses to an offer to have the City contact the respondent about their rights as a cable customer and discounts for low income seniors and people with disabilities varied dramatically by demographic group. Figures 39a through c show that the desire to be contacted decreases significantly as income or education increase and increase significantly with age. Figure 39d shows that Caucasian respondents are significantly less likely than either African American respondents or those of other ethnicities to want more information from this office. This information was provided to the Cable Office for follow-up.

39a. Want to be contacted by City about rights as a cable customer by income



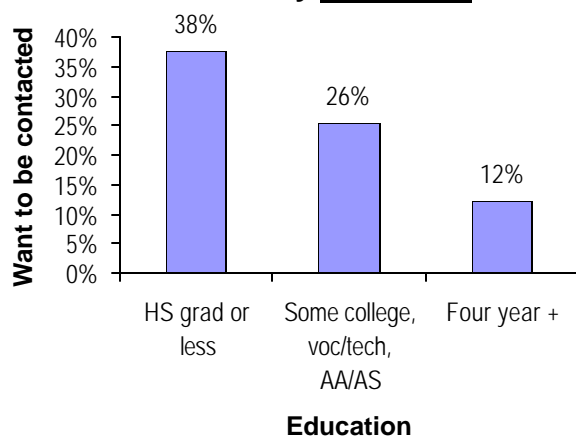
Source: 2004 Seattle IT Residential Survey

39b. Want to be contacted by City about rights as a cable customer by age



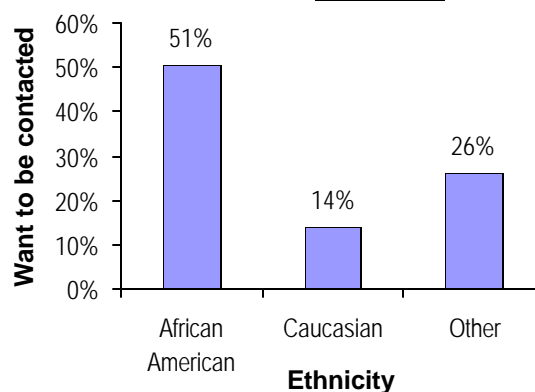
Source: 2004 Seattle IT Residential Survey

39c. Want to be contacted by City about rights as a cable customer by education



Source: 2004 Seattle IT Residential Survey

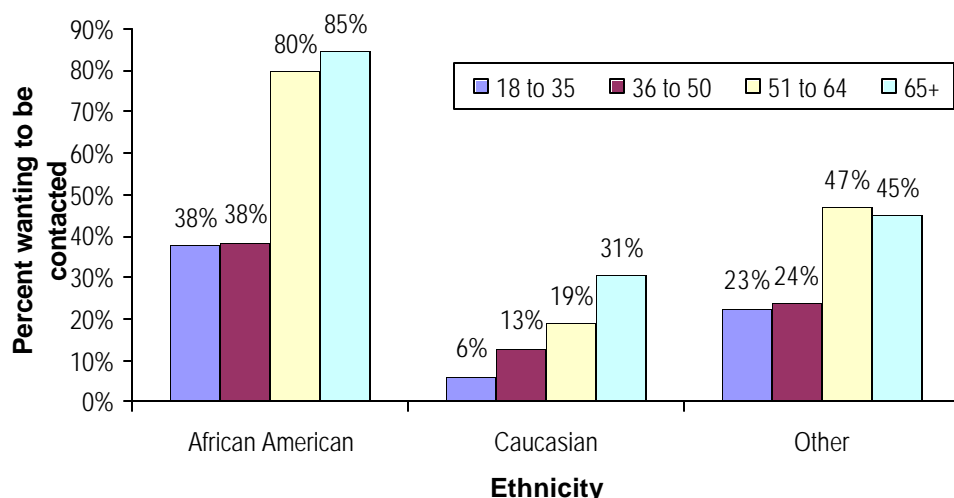
39d. Want to be contacted by City about rights as a cable customer by ethnicity



Source: 2004 Seattle IT Residential Survey

Another layer of complexity lays over these overall relationships between wanting to learn more from the City about rights as a cable customer and the demographic items analyzed. Figure 40

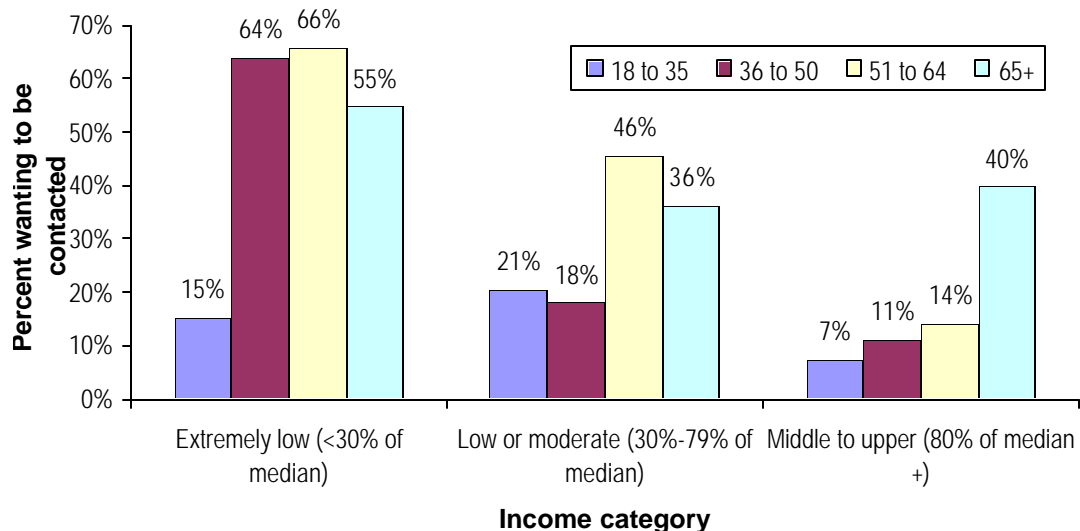
40. The increase with age in the percentage of respondents wanting to be contacted by the City's Cable Office is sooner and steeper among the non Caucasian respondents



Source: 2004 Seattle IT Residential Survey

to be contacted and Caucasian respondents are the least likely to want to be contacted. The additional information that this figure provides is that while the percentage of Caucasian respondents wanting to be contacted increases steadily with age, the jump among the African American respondents and respondents of other non Caucasian ethnicities is more dramatic and occurs first among a younger group of respondents.

41. The increase with age in the percentage of respondents wanting to be contacted by the City's Cable Office is sooner and steeper at the lowest income levels



Source: 2004 Seattle IT Residential Survey

illustrates the somewhat more complex relationship between age and ethnicity on wanting to be contacted. Like Figure 39b, this figure shows that a desire to be contacted by the City increases with age, regardless of ethnic background, and like Figure 39d, it shows that African American respondents are the most likely to want

Figure 41 confirms the general trend of decreasing desire to be contacted with increasing income, and increasing desire to be contacted with increasing age. But this figure also reveals that the increase with age occurs at younger ages as income decreases. Figures 39a through c suggest that the City might

want to increase outreach efforts to older, lower income and less educated residents. Figures 40 and 41 fine-tune this finding somewhat suggesting that the age group to target might be younger for non Caucasians and lower income groups. It is important to note that these groups wanting more information are the same groups with less access to computer and Internet technology. If the City chooses to reach out to these individuals, this may also be an opportunity to explore some of the important issues and impacts of limited access to technology, as well as potential solutions.

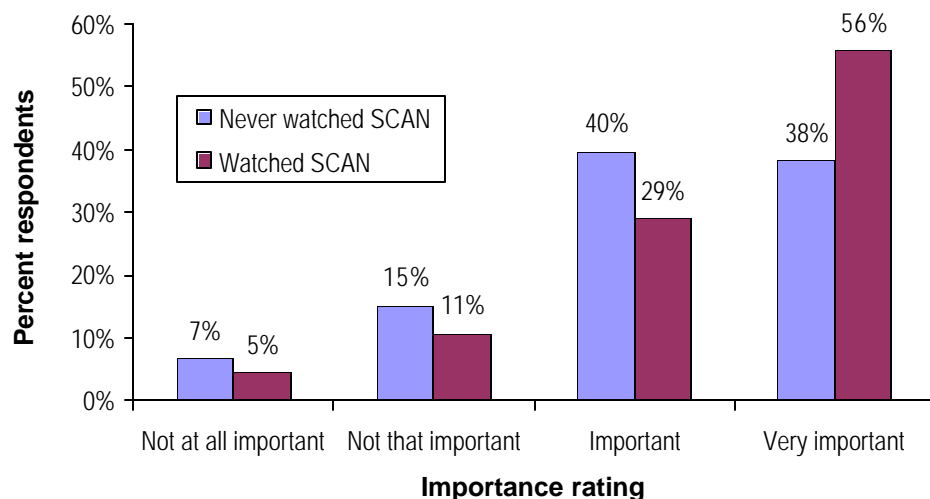
Public access television: Seattle Community Access Network (SCAN)

Respondents, cable subscribers and non subscribers, were asked questions about SCAN, the Seattle Community Access Network. This is a public access channel where the public can create and show their own television programs. Overall, nearly half (48%) of the respondents said they have watched SCAN – more likely are: cable TV subscribers (56% vs. 35% of the non subscribers); and men (54% vs. 43% of the women). Less likely are: older residents (30% of the 65+ group vs. about half of the younger respondents); and those in the lowest income group (37% vs. 50% of those with more than 30% of the median income). It is important to realize that the difference in experience with SCAN among the different income groups is not longer significant when cable access is included in the analysis. In other words, when access to cable is taken into consideration, respondents in the different income groups are equally likely to have seen SCAN, suggesting that the difference is due to a difference in access to SCAN rather than a difference in interest among different income groups.

More than three-fourths (81%) of the respondents said they think it is important or very important for residents and organizations to have access to SCAN (see Figure 42), diminishing with age (Figure 43). Of those who had seen it, 56% said they don't watch it regularly, maybe just when they are channel surfing (Figure 44).

42. Overall, respondents believe it is important or very important for residents to have access to SCAN. Those who have watched it express this view significantly more strongly.

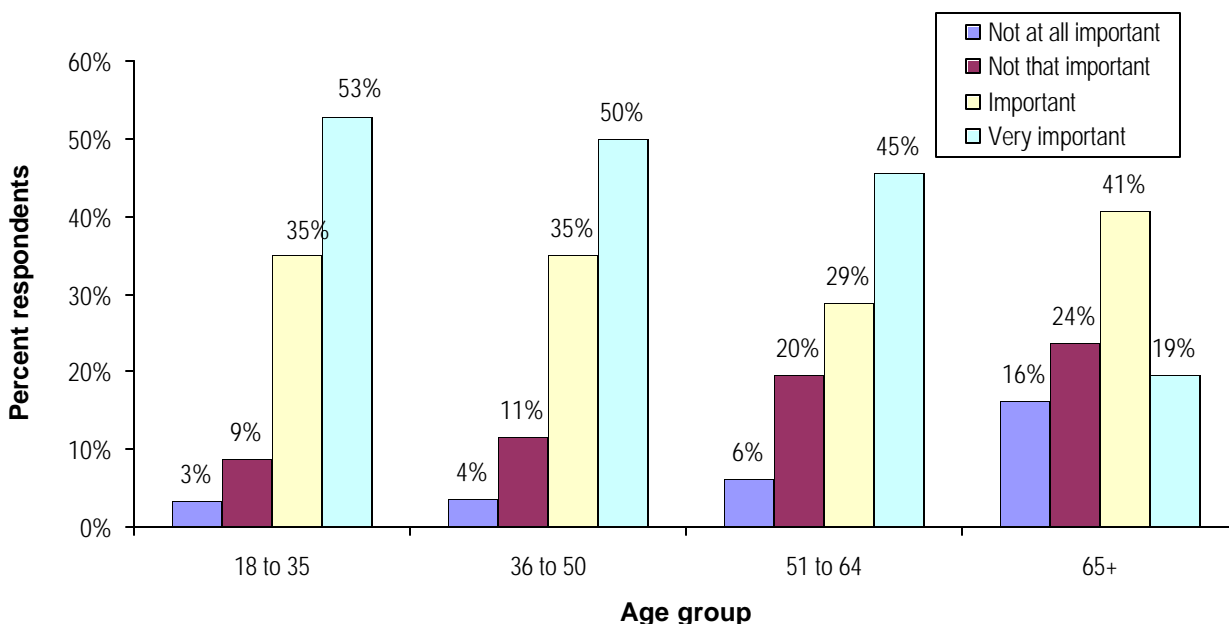
This figure illustrates the high importance rating given the SCAN channel by Seattle residents, especially those who have watched it.



Source: 2004 Seattle IT Residential Survey

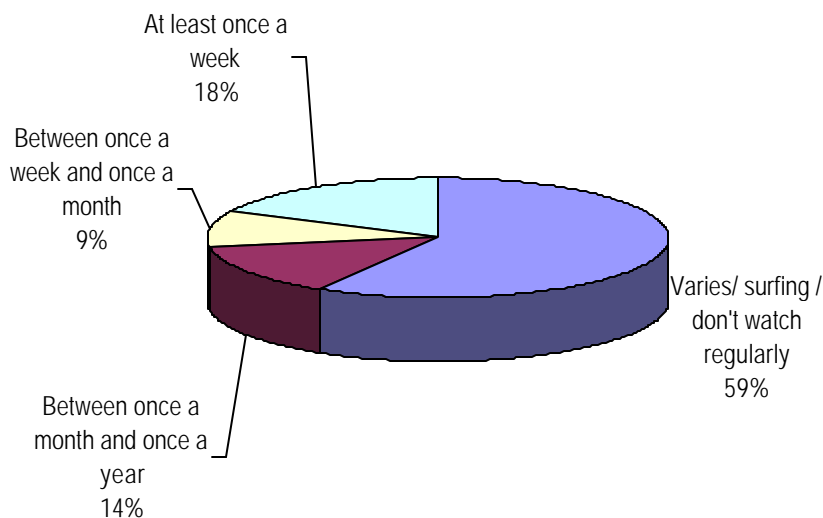
Figure 43 displays the importance ratings given SCAN by residents of different age groups. This figure shows that although seniors also find the public access channel important, this group gives it a lower importance rating than do the younger residents.

43. Seniors see SCAN as less important than younger residents



Source: 2004 Seattle IT Residential Survey

44. Most residents who watch SCAN do so irregularly; about one in five watch at least weekly

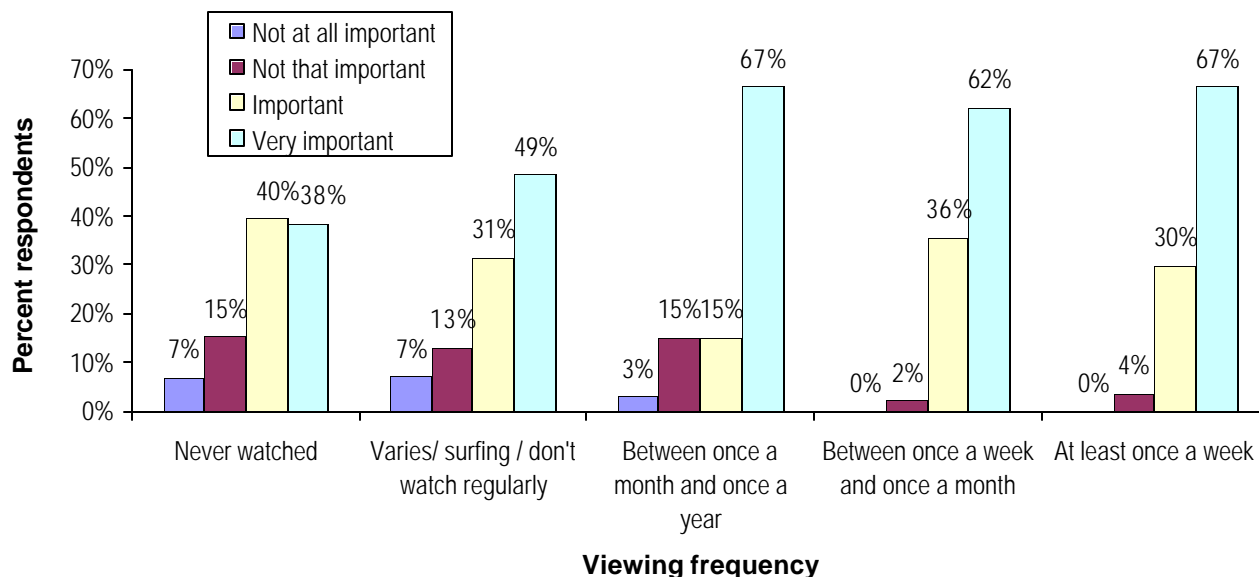


Source: 2004 Seattle IT Residential Survey

Figure 44 shows how often those who have seen SCAN tune in. Most (3 out of 5) catch SCAN irregularly, perhaps while channel surfing. One in five say they watch it at least weekly.

Figure 45 combines the information from the previous two figures and shows that about two-thirds of the respondents who watch SCAN regularly think it is very important, as do about half of those who watch it irregularly.

45. Regardless of viewing frequency, residents say access to SCAN is important or very important



Source: 2004 Seattle IT Residential Survey

Seattle Channel

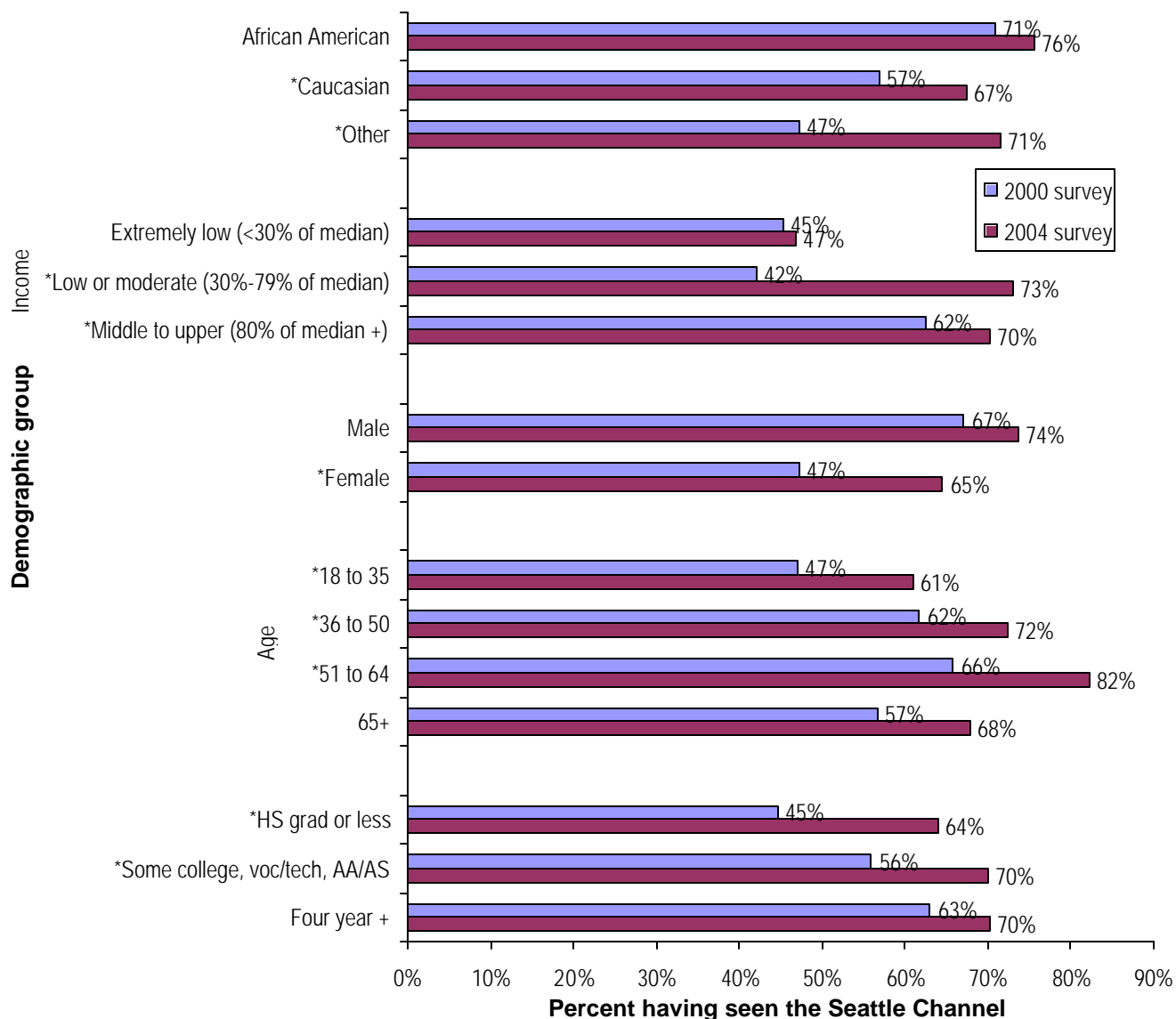
Respondents were asked about their experience with and opinions about the Seattle Channel. This is the government channel with City Council meetings and programs about city services and can be viewed on cable television or over the Internet. More than half (56%) of the respondents said they've seen this channel, fewer (36%) in the lowest income group and more among cable subscribers (69% vs. 33% of non subscribers). Again, as with SCAN, it is important to note that when the analysis controls for cable access, the difference by income level disappears, suggesting that the lower rate of experience for low income users is associated with lack of access to cable rather than lack of interest in the Seattle channel. These findings indicate that the community's lowest income residents may have disproportionately less access to community information as technology expectations for access, and the associated costs, increase.

A similar question was asked of cable subscribers in the 2000 residential survey: "Have you ever seen or watched the City of Seattle government cable channel, TV-Sea on channel 21?". Even though the percentage of residents with cable television did not increase significantly between 2000 and 2004, the percentage of cable subscribers who say they have watched the Seattle Channel has (from 57% in 2000 to 69% in 2004).

Figure 46 shows the change in watching the Seattle Channel among cable television subscribers between 2000 and 2004 for each demographic group. This figure shows a significant increase among: all ethnic groups except African Americans where the percentage watching the Seattle

Channel was already high; among those of low or higher income – and not among those with extremely low income; among women; among all age groups except the oldest and among all education groups except those with a four year college degree or more.

46. Increase in percentage having seen the Seattle Channel between 2000 and 2004 apparent in many demographic groups

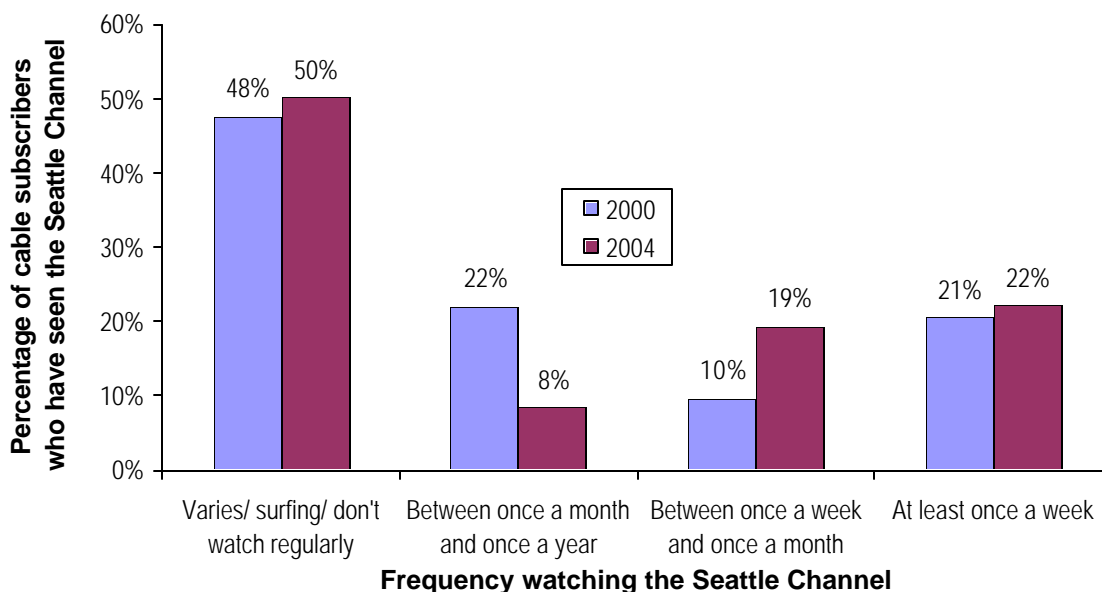


Source: 2004 Seattle IT Residential Survey

(Base: All respondents)

Not only has the number of people watching the Seattle Channel increased since 2000, those who watch it are watching it more often. Looking just at the cable subscribers who have seen the Seattle Channel, Figure 47 shows that in both years, about half said they don't watch regularly (2000: 48%; 2004: 50%) and about one-fifth said they watch at least once a week (2000: 21%; 2004: 22%). But in 2000, 22% said they watch less than once a month but more than once a year, down to about one-third of that (8%) in 2004. At the same time, the percentage saying they watch between once a week and once a month about doubled from 10% in 2000 to 19% in 2004.

47. Viewing frequency of the Seattle Channel among cable TV subscribers has increased since 2000

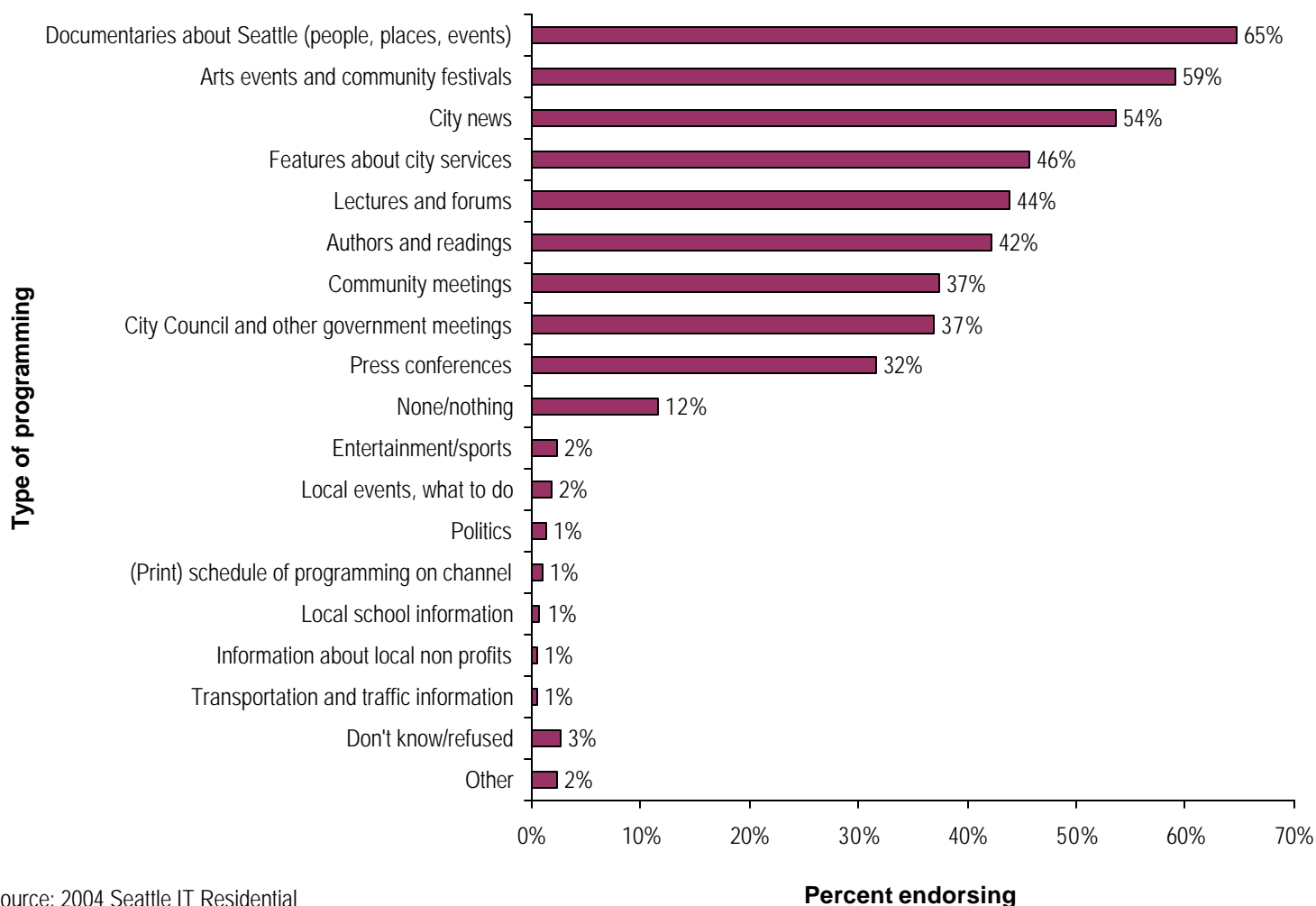


Source: 2004 Seattle IT Residential Survey

Respondents were also asked what type of programming would encourage them to watch the Seattle Channel or to watch it more. They were read a list of options and were allowed to endorse as many as they wanted. Figure 48 illustrates the responses. Overall, a high level of interest was indicated for most of the options with press conferences being the least frequently endorsed – by one-third of the respondents. Nearly two-thirds said documentaries about Seattle would encourage them to watch the Seattle channel more, and more than half endorsed arts events and community festivals, and city news.

Those with cable TV were more likely to endorse features about city services (47% vs. 40%) and documentaries about Seattle (58% vs. 54%), but no other differences between subscribers and non subscribers reached statistical significance.

48. Type of programming that would encourage residents to watch the Seattle Channel, or watch it more



Source: 2004 Seattle IT Residential

Ethnic differences emerged in response to several of these items. Specifically, African American respondents were more likely than Caucasians to endorse city council and other government meetings (45% vs. 36%), features about city services (57% vs. 41%), city news (62% vs. 52%), community meetings (50% vs. 37%), and authors and readings (56% vs. 42%). The same pattern emerges for documentaries about Seattle among residents over 50 (endorsed by 67% of the African Americans in this age group compared with 57% of the Caucasians) but the opposite pattern emerges for those 50 and younger (62% of the African Americans and 69% of the Caucasians).

Residents with more education are more likely to endorse lectures and forums (50% of those with a four year college degree or more, compared with 41% of those with some college or a voc/tech degree or a two year degree and 29% of those with a high school education or less). Education is also related to interest in authors and readings, but less dramatically. Thirty-five percent of those with the least education endorsed this option, up to 44% of those with some college or more.